

# Document Automation ROI Calculator

## How Much Is Manual Paperwork Actually Costing You?

By KernTech — Workflow Automation for Small Businesses

### How to Use This Calculator

Fill in your numbers for each row. We've included industry benchmarks if you're not sure. Multiply across to find your annual cost — then see what automation typically saves.

### Step 1: Count Your Manual Document Tasks

|                                                                            |                                                                                      |
|----------------------------------------------------------------------------|--------------------------------------------------------------------------------------|
| Task   Your Hours/Week   × Staff Cost/Hr   = Weekly Cost    ----- :- :- :- | <b>Client intake / onboarding forms</b>   ____ hrs   \$ ____   \$ ____               |
|                                                                            | <b>Data entry from documents into systems</b>   ____ hrs   \$ ____   \$ ____         |
|                                                                            | <b>Chasing clients for missing documents</b>   ____ hrs   \$ ____   \$ ____          |
|                                                                            | <b>Filing, renaming, organizing documents</b>   ____ hrs   \$ ____   \$ ____         |
|                                                                            | <b>Generating reports or proposals from templates</b>   ____ hrs   \$ ____   \$ ____ |
|                                                                            | <b>Compliance / audit document prep</b>   ____ hrs   \$ ____   \$ ____               |
|                                                                            | <b>TOTAL</b>   ____ hrs     \$ ____                                                  |

Your Annual Cost: Weekly Total × 50 weeks = \$ \_\_\_\_\_

### Step 2: Industry Benchmarks (If You Need a Starting Point)

|                                                                       |                                                                                    |
|-----------------------------------------------------------------------|------------------------------------------------------------------------------------|
| Task   Accounting Firms   MSPs   Insurance Agencies    ----- :- :- :- | Client intake forms   4 hrs/wk   2 hrs/wk   5 hrs/wk                               |
|                                                                       | Data entry   8 hrs/wk   3 hrs/wk   6 hrs/wk                                        |
|                                                                       | Chasing missing docs   5 hrs/wk   1 hr/wk   4 hrs/wk                               |
|                                                                       | Filing & organizing   3 hrs/wk   2 hrs/wk   3 hrs/wk                               |
|                                                                       | Reports & proposals   3 hrs/wk   4 hrs/wk   2 hrs/wk                               |
|                                                                       | Compliance prep   4 hrs/wk   3 hrs/wk   5 hrs/wk                                   |
|                                                                       | <b>Total</b>   <b>27 hrs/wk</b>   <b>15 hrs/wk</b>   <b>25 hrs/wk</b>              |
|                                                                       | <b>Annual cost @ \$35/hr</b>   <b>\$47,250</b>   <b>\$26,250</b>   <b>\$43,750</b> |

### Step 3: Calculate Your Automation Savings

Most document workflows can be **60–80% automated** in the first phase. Use 65% as a conservative estimate.

|                        |                                                                               |
|------------------------|-------------------------------------------------------------------------------|
| Your Numbers    --- :- | <b>A. Annual manual document cost (from Step 1)</b>   \$ _____                |
|                        | <b>B. Automation rate (use 65% if unsure)</b>   %                             |
|                        | <b>C. Annual savings (A × B)</b>   \$ _____                                   |
|                        | <b>D. Typical automation setup cost (one-time)</b>   <b>\$1,500 – \$4,500</b> |
|                        | <b>E. Payback period (D ÷ C × 12)</b>   <b>** months**</b>                    |

## Step 4: What Gets Automated (and What Doesn't)

### ✓ High-ROI Automation Targets

- **Intake forms** → Digital forms that auto-populate your systems
- **Document requests** → Automated reminders until client uploads
- **Data extraction** → AI reads documents and enters data for you
- **Filing** → Auto-sort and rename based on content
- **Standard reports** → One-click generation from live data

### ⚠ Still Needs a Human

- Complex judgment calls on non-standard documents
- Client relationship conversations
- Regulatory interpretation (but prep work can be automated)

## Real Numbers: What Firms Like Yours Typically See

| Metric | Before | After | Change | |-----|:-|:-|:-| | Hours/week on document tasks | 20–30 | 5–10 | ↓ **65%** | | Client onboarding time | 3–5 days | Same day | ↓ **80%** | | Missing document follow-ups | 5–8 per week | 0–1 (automated) | ↓ **90%** | | Data entry errors | 5–10% rate | < 1% | ↓ **90%** | | Staff freed up for billable work | — | 10–20 hrs/wk | 💰 |

## Your ROI Summary

Write your final numbers here:

- **Current annual cost of manual document work:** \$ \_\_\_\_\_
- **Projected annual savings with automation:** \$ \_\_\_\_\_
- **Estimated payback period:** \_\_\_\_ months
- **Hours/week returned to your team:** \_\_\_\_ hrs

## Ready to See Your Specific Numbers?

We'll run this analysis with your actual tools, team, and workflows — free, in 30 minutes.

**Book your workflow audit:** [cal.com/alan-kerntech/30min](https://cal.com/alan-kerntech/30min)

You'll walk away with a concrete savings estimate and a prioritized automation roadmap.

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